



NC E-Procurement Upgrade Go-Live Postcard #13

School System Edition

Fun Fact Over 6,000 purchase orders were created in the new NC E-Procurement system in the first week.

Saved Searches System searches are a helpful way to **view dynamic information** in the NC E-Procurement system. If there is a search you use frequently, you can save the search criteria in a Saved Search which will allow you to run it quickly, without resetting the search filters. For example, you can create a Saved Search for your requisitions in 'Submitted' status with the date created set to 'This Week' so you can see your recently created requisitions that are still in the approval flow with just one click. Also note that adding a meaningful title to your requisitions, such as the name of a special project, also allows them to be easily searched. **Select at least three search criteria** when running a search to help the system search efficiently.

NCID Case Sensitivity Some NCID usernames are created with both upper and lower case characters. When you log into the NCID web site it does not verify the case, but the **NC E-Procurement site is case sensitive**. If you are having trouble logging in or wish to change the case of your NCID username in NC E-Procurement, please contact your Security Administrator or the NC E-Procurement Help Desk at 888-211-7440, option 1, or at ephelpdesk@its.nc.gov.

Adding Shipping Costs If your order requires additional cost for shipping, please **add shipping as a separate line item** with the commodity code 962-86. Your financial system may have a field such as 'Shipping Costs,' 'Freight' or 'Other Costs'; however this information is not transferred into the NC E-Procurement system as a separate line. Entering this cost as a separate line item makes it more clear and keeps this service charge separate from the cost of the goods themselves.

Feature Focus: Customizing your Dashboard The NC E-Procurement Dashboard can be completely rearranged to better fit your needs. Whether you are a requester, an approver, or a receiver, feel free to **'click and drag'** the **portlets** to the most convenient place on your Dashboard.

This Dashboard has been rearranged to allow the user easier access to their recently created requisitions:

As a requester, having 'My Documents' at the top of the page allows easier access to requisitions that were recently created.

Title	Date	Status
US2491	7/11/2012	Composing
US1933	7/10/2012	Composing
US1956	7/10/2012	Composing
RQ16022289	7/9/2012	Composing
RQ16020830	7/9/2012	Composing
US1204	7/8/2012	Composing
US1292	7/8/2012	Actioned
US1292	7/8/2012	Actioned

Recently Viewed

- US1933 Untitled UserMaintenance
- RQ16022289 Untitled Requisition
- US1292 Untitled UserMaintenance
- US1291 Untitled UserMaintenance

Search

Order ID:

Legacy Document ID:

My Saved Searches

PO Search

News

Welcome to the New NC E-Procurement @ Your Service!

We are excited for you to try out the upgraded NC E-Procurement system. Here are some tips for getting started:

- Check that your bookmark is set to exactly: <https://buyer.nc.gov/MyUser/Main>
- Personalize your dashboard (Click 'Configure Tabs')
- Set up your system searches (Click 'Save Search' from a search page)
- Update your email notification and other preferences (Click 'Preferences')
- Training resources are available at: <http://ncprocurement.org/Training.html>

Follow-Up

We sent this postcard to NC E-Procurement school system users, purchasing directors, and finance officers.

Questions about information covered in this Postcard? Send an e-mail to: ephelpdesk@its.nc.gov
